

2008 JAN -9 AM 10:36

OFFICE OF THE CLERK  
U.S. HOUSE OF REPRESENTATIVESU.S. House of Representatives  
110<sup>th</sup> CongressEMPLOYEE  
POST-TRAVEL DISCLOSURE FORM

This form is for disclosing the receipt of travel expenses from private sources for meetings, speaking engagements, fact-finding trips or similar events in connection with official duties. You need not disclose government-funded or political travel on this form, or travel that is unrelated to official duties. This form does not eliminate the need to report all privately-funded travel on the annual Financial Disclosure Statements of those persons required to file them. In accordance with clause 5 of House Rule 25, complete this form and file it with the Clerk of the House of Representatives, B-106 Cannon House Office Building, within 15 days after travel is completed. The Clerk is to make these forms publicly available as soon as possible after they are received. Obtain the dollar amounts from the sponsor; if exact dollar amounts are unavailable, provide a good faith estimate.

Name of Employee (print or type): David L. CavickeName of Accompanying Family Member (if any): Christina RosatiRelationship to Employee: ☐ Spouse ☐ Child ☒ Other (specify): GirlfriendDate of Departure and Date of Return: 11/01/2007 to 11/03/2007Dates at Personal Expense: NoneItinerary (cities of departure – destination – return): Washington D.C. - Cambridge, MD - Washington D.C.Sponsor(s) (who paid for the trip): Congressional InstituteDescribe meetings and events attended (attach additional pages if necessary): Participated and attended  
meetings and forums to learn, communicate, and network on the the challenges and rewards of managing  
congressional offices.

Attached to this form are EACH of the following (signify "yes" for each item by checking the corresponding box):

1. ☒ the Private Sponsor Travel Certification Form completed by trip sponsor, including all attachments;
2. ☒ the Privately-Sponsored Travel Approval Form completed by the employee; *and*
3. ☒ the Committee on Standards' letter approving my participation on this trip.

I represent that I participated in each of the activities reflected in the sponsor's agenda (signify "yes" by checking box): ☒

If not, explain: \_\_\_\_\_

**TRAVEL EXPENSES:**

	Total Transportation Expenses	Total Lodging Expenses	Total Meal Expenses
For employee:	Drove own Car	274.50	172.05
For accompanying family member:		0	0

	Other Expenses (dollar amount)	Specific Nature of Expenses (e.g., taxi, parking, registration fee, etc.)
For employee:	0	
For accompanying family member:	0	

I certify that the information contained in this form is true, complete, and correct to the best of my knowledge.

SIGNATURE OF EMPLOYEE: ZZ Cande

DATE: 1/8/08

I authorized this travel in advance. I have determined that all of the expenses listed above were necessary and that the travel was in connection with the employee's official duties and would not create the appearance that the employee is using public office for private gain.

NAME OF SUPERVISING MEMBER: Joe Barton

SIGNATURE OF SUPERVISING MEMBER: Joe Barton

DATE: 1/8/08

Version date 4/2007 by Committee on Standards of Official Conduct

U.S. House of Representatives  
Committee on Standards of Official Conduct

**PRIVATELY-SPONSORED TRAVEL APPROVAL FORM**  
**For Members, Officers and Employees**  
**(submit directly to the Committee)**

This form should be completed by House Members, officers or employees seeking Committee approval of privately-sponsored travel or reimbursement for travel under House Rule XXV, clause, 5. The completed form should be submitted directly to the Committee by each invited House Member, officer or employee, together with the completed and signed Private Sponsor Travel Certification Form.

*Members, officers and employees seeking approval for travel are urged to submit all forms to the Committee at least 30 days before travel is scheduled to begin. The failure to provide the Committee with adequate time to review the form and attachments may result in the invitee not receiving approval for the trip. The submission of an incomplete form will delay the review process. A copy of this form will be made available for public inspection. Please type form. Form (and any attachments) may be faxed to the Committee at (202) 226-7172.*

1. Name of Member, officer or employee (traveler): David Caviee
2. Sponsor(s) (who will be paying for the trip): Congressional Institute
3. a. Dates of travel: Nov. 1-4, 2007  
b. Will you be extending the trip at your personal expense? ☒ Yes ☐ No  
If yes, dates at personal expense: November 3-4 Lodging, Nov. 4 expenses
4. If travel is for participation a one-day event (per trip sponsor question 10), check one of the following:
  - a. Approval for one-night's lodging and meals is being requested: ☐ or
  - b. Approval for two-nights' lodging and meals is being requested: ☒If "b" is checked, explain why the second night is warranted:  
This is a 2-day event; second day includes Friday evening events, warranting a Friday night stay.
5. Travel destination(s): Cambridge MD
6. Explain why participation in the trip is connected to your official or representational duties:  
The Bicameral Chiefs of Staff Retreat provides seminars on office operations as well as opportunities to interact with fellow staff leadership
7. Private Sponsor Travel Certification Form is attached, including agenda, invitee list, and any other attachments (signify "yes" by checking box): ☒

8. I certify that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: \_\_\_\_\_

*D J Cavicke*

Name of Signatory (if other than traveler): \_\_\_\_\_

For staff, name of employing Member/Committee: Committee on Energy and Commerce

Office address: 2322A Rayburn HOB Washington, DC 20515

Phone number: 202-225-3641

Email address: David.Cavicke@mail.house.gov

Committee staff may contact you if additional information is required.

**FOR STAFF:**

**TO BE COMPLETED BY YOUR EMPLOYING MEMBER:**

I hereby authorize the individual named above, an employee of the U.S. House of Representatives who works under my direct supervision, to accept expenses for the trip described in this request. I have determined that the above-described travel is in connection with my employee's official duties and that acceptance of these expenses will not create the appearance that the employee is using public office for private gain.

*Joe Barton*

Signature of Employing Member

Date: 9-27-07

If there are any questions regarding this form please contact the Committee:

Committee on Standards of Official Conduct  
U.S. House of Representatives  
HT-2, The Capitol  
Washington, DC 20515  
(202) 225-7103 (phone)  
(202) 225-7392 (general fax)  
(202) 226-7172 (fax for travel approvals)

*Version date 4/2007 by Committee on Standards of Official Conduct*

**Bicameral Chiefs of Staff Retreat**  
**Thursday, November 1<sup>st</sup> – Saturday, November 3<sup>rd</sup>**  
**The Hyatt Regency Chesapeake Bay, Cambridge, Maryland**

**REGISTRATION FORM**  
FAX to (202) 547-3556

☒ YES, I am planning to attend the Bicameral Chiefs of Staff Retreat Thursday, November 1 - Saturday, November 3, 2007 pending ethics approval.

☒ YES, my <sup>quest</sup> spouse will attend.

☐ YES, my children will attend.

☐ NO, I will not attend the retreat.

Date Arriving: November 1, 2007

Date Departing: November 4, 2007

Your Name (for nametag): David Cavicke

Spouse's Name (for nametag): Guest: Christina Rosati

Children's Names and Ages:

_____	_____
_____	_____
_____	_____
_____	_____

Member Office/Institution (for nametag): Energy and Commerce Committee

Phone: 202-225-3641 Fax: 202-225-1919

Email: David.Cavicke@mail.house.gov

**ROOM NEEDS:**    ☒ Non-Smoking Room    ☐ Smoking Room, if available

☒ Please also reserve my room for Saturday night at my own expense. I understand that the hotel will charge me directly at a room rate of \$137.25 for the extra night.

☐ Special needs, dietary requirements, room needs, etc.: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

U.S. House of Representatives  
Committee on Standards of Official Conduct

**PRIVATE SPONSOR TRAVEL CERTIFICATION FORM**  
(provide directly to each House invitee)

This form should be completed by private entities offering to provide travel or reimbursement for travel to House Members, officers or employees under House Rule XXV, clause 5. A completed copy of the form (and any attachments) should be provided to each invited House Member, officer or employee, who will then forward it to the Committee. The trip sponsor should NOT submit the form directly to the Committee.

*Private sponsors are urged to submit this form to each House invitee at least 30 days before travel is scheduled to begin. The failure to provide the Committee with adequate time to review the form and attachments may result in the invitee not receiving approval for the trip. The submission of an incomplete form will delay the review process. Before completing this form, sponsors are urged to carefully review the Committee's private travel guidelines and advisory memoranda detailing the rules and restrictions for private travel, as well as the instructions for completing this form. Sponsors should call the Committee with any questions prior to submitting the form. Please type form.*

1. Sponsor(s) (who will be paying for the trip): The Congressional Institute
2. I represent that the trip will not be financed (in whole or in part) by a federally-registered lobbyist or a registered foreign agent (signify "yes" by checking box): ☒
3. I represent that the trip sponsor(s) has not accepted from any other source funds earmarked directly or indirectly to finance any aspect of the trip (signify "yes" by checking box): ☒
4. Is travel being offered to an accompanying family member of the House invitee(s)? ☒ Yes ☐ No
5. Provide names and titles of ALL House invitees; for each invitee, provide explanation of why the individual was invited (include additional pages if necessary): See attached
6. Dates of travel: November 1-3, 2007
7. Cities of departure - destination - return: Washington DC - Cambridge, MD - Washington DC
8. Attached is a detailed agenda of the activities taking place during the travel (i.e., an hourly description of planned activities) (signify "yes" by checking box): ☒
9. I represent that (check one of the following):
  - a. The sponsor of the trip is an institution of higher education within the meaning of section 101 of the Higher Education Act of 1965: ☐ or
  - b. The sponsor of the trip does not retain or employ a federally registered lobbyist or registered foreign agent: ☒ or
  - c. The trip is for attendance at a one-day event and lobbyist involvement in planning, organizing, requesting, or arranging the trip was *de minimis* under the Committee's travel regulations. ☐
10. If travel is for participation in a one-day event (i.e., if you checked Question 9(c)), check one of the following:
  - a. One-night's lodging and meals are being offered: ☐ or
  - b. Two-nights' lodging and meals are being offered: ☒If "b" is checked, explain why the second night is warranted: This is a 2-day event; 2nd day includes Friday evening events, warranting Friday night stay.

11. If the trip is not sponsored by an institution of higher education, I represent that a federally-registered lobbyist or foreign agent will not accompany House Members or employees on any segment of the trip (signify "yes" by checking box): ☒
12. Private sponsors must have a direct and immediate relationship to the purpose of the trip or location being visited. Describe the role of each sponsor in organizing and conducting the trip: \_\_\_\_\_  
The Congressional Institute President and staff organize, manage and control the event.
13. Describe each sponsor's organizational interest in the purpose of the trip: The purpose of the the Congressional Institute, a 501(c)(4) organization, is to promote public education about Congress and to hold educational conferences including retreats for Members of Congress, staff and others.
14. Describe the type and class of the transportation being provided. Indicate whether coach, business-class or first-class transportation will be provided. In addition, for travel via aircraft, please indicate if travel is being offered on a commercial flight, chartered flight or on an aircraft operated or paid for by a carrier not licensed by the Federal Aviation Administration to operate for compensation or hire (i.e., a private aircraft). If first-class fare is being provided, or if travel is via chartered or private aircraft, please provide an explanation describing why such travel is warranted: None
15. I represent that the expenditures related to local area travel during the trip will be unrelated to personal or recreational activities of the invitee(s). (signify "yes" by checking box): ☒
16. I represent that either (check one of the following):
- a. The trip involves an event that is arranged or organized *without regard* to congressional participation and that meals provided to congressional participants are similar to those provided to or purchased by other event attendees: ☐ or
  - b. The trip involves events that are arranged or organized *specifically with regard* to congressional participation: ☒
- If "b" is checked, detail the cost per day of meals (approximate cost may be provided): Thursday, 11/1: \$157, Friday 11/2: \$206, Saturday 11/3 \$22.50
17. Reason for selecting the location of the event or trip: Proximity to Washington DC and convenience of the participants
18. Name of hotel or other lodging facility: Chesapeake Hyatt, Cambridge, MD
19. Cost per night of hotel or other lodging facility (approximate cost may be provided): \$122 room rate and 12.5% taxes
20. Reason(s) for selecting hotel or other lodging facility: Proximity to Washington DC and convenience of the participants



21. TOTAL EXPENSES FOR EACH PARTICIPANT:

<input type="checkbox"/> actual amounts <input checked="" type="checkbox"/> good faith estimates	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
For each Member, Officer, or employee	\$0	\$274.50	\$386
For each accompanying family member	\$0	\$0	spouse \$344 or child \$233

	Other Expenses (dollar amount)	Identify Specific Nature of "Other" Expenses (e.g., taxi, parking, registration fee, etc.)
For each Member, Officer, or employee	\$0	
For each accompanying family member	\$0	

22. I represent that reimbursement for miscellaneous travel expenses for the trip, such as travel to and from airports, security costs, interpreter fees, visa application fees, and similar expenses, will be for actual costs incurred and are necessary for the purpose of the trip (signify "yes" by checking box): ☒

23. I certify that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: Mark Strand

Name and title: Mark Strand, President

Organization: The Congressional Institute

Address: 1001 N. Fairfax Street, STE 420, Alexandria, VA 22134

Telephone number: 703-837-8812

Fax number: 703-837-8817

Email Address: strand@conginst.org

The Committee staff may contact the above individual above if additional information is required.

If there are any questions regarding this form please contact the Committee at the following address:

Committee on Standards of Official Conduct  
U.S. House of Representatives  
HT-2, The Capitol  
Washington, DC 20515  
(202) 225-7103 (phone)  
(202) 225-7392 (general fax)  
(202) 226-7172 (fax for travel approvals)

Version date 4/2007 by Committee on Standards of Official Conduct



**Bicameral Chiefs of Staff Retreat**

9/18/2007

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Name			Institution	Reason Invited:
1	Will	Plaster	House Administration Cmte.	Staff Director
2	William	O'Conner	House Agriculture Cmte.	Staff Director
3	Frank	Cushing	House Appropriations Cmte.	Staff Director
4	Bob	Simmons	House Armed Services Cmte.	Staff Director
5	James	Bates	House Budget Cmte.	Staff Director
6	Victor	Klatt	House Education & Labor Cmte.	Staff Director
7	Bud	Albright	House Energy & Commerce Cmte.	Staff Director
8	Thomas	Weimer	House Energy Independence & Global	Staff Director
9	Todd	Ungerecht	House Ethics Cmte.	Staff Director
10	Larry	Lavendar	House Financial Services Cmte.	Staff Director
11	Yleem	Poblete	House Foreign Affairs Cmte.	Staff Director
12	Rob	O'Connor	House Homeland Security Cmte.	Staff Director
13	Michael	Meermans	House Intelligence Cmte.	Staff Director
14	Joseph	Gibson	House Judiciary Cmte.	Staff Director
15	Llyod	Jones	House Natural Resources Cmte.	Staff Director
16	David	Martin	House Oversight & Government Reform	Staff Director
17	Seth	Webb	House Republican Conference	Leadership Staff
18	Karen	Haas	House Republican Conference	Leadership Staff
19	Rachel	Hodges	House Republican Conference	Leadership Staff
20	Ed	Patru	House Republican Conference	Leadership Staff
21	Charles	Cooper	House Republican Conference	Leadership Staff
22	Nathan	Imperiale	House Republican Conference	Leadership Staff
23	Patrick	Rothwell	House Republican Policy Committee	Leadership Staff
24	Hugh	Halpern	House Rules Committee	Staff Director
25	Janet	Poppleton	House Science & Technology Cmte.	Staff Director
26	Kevin	Fitzpatrick	House Small Business Cmte.	Staff Director
27	James	Coon	House Transportation & Infrastructure	Staff Director
28	James	Lariviere	House Veterans' Affairs Cmte.	Staff Director
29	Brett	Loper	House Ways & Means Cmte.	Staff Director
30	Hood	Harris	Office of Cong. Aderholt	Chief of Staff
31	Paul	Protic	Office of Cong. Akin	Chief of Staff
32	Adam	Terry	Office of Cong. Alexander	Chief of Staff

**Bicameral Chiefs of Staff Retreat**

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Name			Institution	Reason Invited:
33	Rich	Dunn	Office of Cong. Bachmann	Chief of Staff
34	Warren	Tryon	Office of Cong. Bachus	Chief of Staff
35	Christina	Casteel	Office of Cong. Baker	Chief of Staff
36	Lance	Williams	Office of Cong. Barrett	Chief of Staff
37	Bud	Otis	Office of Cong. Bartlett	Chief of Staff
38	Heather	Couri	Office of Cong. Barton	Chief of Staff
39	Kathy	Lydon	Office of Cong. Biggert	Chief of Staff
40	Steve	Danon	Office of Cong. Bilbray	Chief of Staff
41	Rebecca	Hyder	Office of Cong. Bilirakis	Chief of Staff
42	Scott	Parker	Office of Cong. Bishop	Chief of Staff
43	Steve	Brophy	Office of Cong. Blackburn	Chief of Staff
44	Amy	Poe	Office of Cong. Blunt	Chief of Staff
45	Mick	Krieger	Office of Cong. Boehner	Chief of Staff
46	Alan	Spencer	Office of Cong. Bonner	Chief of Staff
47	Frank	Cullen	Office of Cong. Bono	Chief of Staff
48	Matt	Sagely	Office of Cong. Boozman	Chief of Staff
49	Jeff	Dobrozsi	Office of Cong. Boustany	Chief of Staff
50	Doug	Centilli	Office of Cong. Brady	Chief of Staff
51	Aloysius	Hogan	Office of Cong. Broun	Chief of Staff
52	Delores	DaCosta	Office of Cong. Brown	Chief of Staff
53	Pete	Meachum	Office of Cong. Brown-Waite	Chief of Staff
54	Dave	Karvelas	Office of Cong. Buchanan	Chief of Staff
55	Barry	Brown	Office of Cong. Burgess	Chief of Staff
56	Mark	Walker	Office of Cong. Burton	Chief of Staff
57	Mike	Copher	Office of Cong. Buyer	Chief of Staff
58	Dave	Ramey	Office of Cong. Calvert	Chief of Staff
59	Jim	Brandell	Office of Cong. Camp	Chief of Staff
60	David	Bowser	Office of Cong. Campbell	Chief of Staff
61	Joe	Hunter	Office of Cong. Cannon	Chief of Staff
62	Rob	Collins	Office of Cong. Cantor	Chief of Staff
63	Joel	Brubaker	Office of Cong. Capito	Chief of Staff
64	Richard	Hudson	Office of Cong. Carter	Chief of Staff

**Bicameral Chiefs of Staff Retreat**

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Name			Institution	Reason Invited:
65	Mike	Quaranta	Office of Cong. Castle	Chief of Staff
66	Gary	Lindgren	Office of Cong. Chabot	Chief of Staff
67	Ed	McDonald	Office of Cong. Coble	Chief of Staff
68	Sean	Murphy	Office of Cong. Cole	Chief of Staff
69	Jeff	Burton	Office of Cong. Conaway	Chief of Staff
70	John	Ariale	Office of Cong. Crenshaw	Chief of Staff
71	Tom	Wiblemo	Office of Cong. Cubin	Chief of Staff
72	Tony	Essalih	Office of Cong. Culberson	Chief of Staff
73	Brenda	Otterson	Office of Cong. Davis	Chief of Staff
74	Chris	Connelly	Office of Cong. Davis	Chief of Staff
75	David	Thomas	Office of Cong. Davis	Chief of Staff
76	Justin	Brasell	Office of Cong. Davis	Chief of Staff
77	Chris	Riley	Office of Cong. Deal	Chief of Staff
78	George	McElwee	Office of Cong. Dent	Chief of Staff
79	Thomas	Bean	Office of Cong. Diaz-Balart	Chief of Staff
80	Ana	Carbonell	Office of Cong. Diaz-Balart	Chief of Staff
81	Richard	Robinson	Office of Cong. Doolittle	Chief of Staff
82	Carrie	Melvin	Office of Cong. Drake	Chief of Staff
83	Brad	Smith	Office of Cong. Dreier	Chief of Staff
84	Bob	Griffits	Office of Cong. Duncan	Chief of Staff
85	Bill	McBride	Office of Cong. Ehlers	Chief of Staff
86	Lloyd	Smith	Office of Cong. Emerson	Chief of Staff
87	Annette	Carr	Office of Cong. English	Chief of Staff
88	Wade	Heck	Office of Cong. Everett	Chief of Staff
89	Nate	Webb	Office of Cong. Fallin	Chief of Staff
90	Tonnie	Wybensinger	Office of Cong. Feeney	Chief of Staff
91	Chris	Jones	Office of Cong. Ferguson	Chief of Staff
92	Margaret	Klessig	Office of Cong. Flake	Chief of Staff
93	Dee	Gilmore	Office of Cong. Forbes	Chief of Staff
94	Kelly	Lungren-	Office of Cong. Fortenberry	Chief of Staff
95	Luis	Baco-Sanchez	Office of Cong. Fortuno	Chief of Staff
96	Tom	Quaadman	Office of Cong. Fossella	Chief of Staff

**Bicameral Chiefs of Staff Retreat**9/18/2007  
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Name			Institution	Reason Invited:
97	Todd	Poole	Office of Cong. Foxx	Chief of Staff
98	Tom	Stallings	Office of Cong. Franks	Chief of Staff
99	Nancy	Fox	Office of Cong. Frelinghuysen	Chief of Staff
100	Joel	Kassiday	Office of Cong. Gallegly	Chief of Staff
101	Michelle	Presson	Office of Cong. Garrett	Chief of Staff
102	Guy	Ciarrocchi	Office of Cong. Gerlach	Chief of Staff
103	Anthony	Caligiuri	Office of Cong. Gilchrest	Chief of Staff
104	Mark	Wellman	Office of Cong. Gillmor	Chief of Staff
105	Sean	Dalton	Office of Cong. Gingrey	Chief of Staff
106	Michael	Tomberlin	Office of Cong. Gohmert	Chief of Staff
107	Jerr	Rosenbaum	Office of Cong. Goode	Chief of Staff
108	Shelley	Husband	Office of Cong. Goodlatte	Chief of Staff
109	Robert	Head	Office of Cong. Granger	Chief of Staff
110	Tom	Brown	Office of Cong. Graves	Chief of Staff
111	Janet	Perry-Poppleton	Office of Cong. Hall	Chief of Staff
112	Mike	Stokke	Office of Cong. Hastert	Chief of Staff
113	Todd	Young	Office of Cong. Hastings	Chief of Staff
114	Andrew	Duke	Office of Cong. Hayes	Chief of Staff
115	Mac	Abrams	Office of Cong. Heller	Chief of Staff
116	Dee	Buchanan	Office of Cong. Hensarling	Chief of Staff
117	Derek	Harley	Office of Cong. Herger	Chief of Staff
118	Wayne	Struble	Office of Cong. Hobson	Chief of Staff
119	Amy	Plaster	Office of Cong. Hoekstra	Chief of Staff
120	Erik	Rasmussen	Office of Cong. Hulshof	Chief of Staff
121	Victoria	Middleton	Office of Cong. Hunter	Chief of Staff
122	Wayne	Roper	Office of Cong. Inglis	Chief of Staff
123	Dale	Neugebauer	Office of Cong. Issa	Chief of Staff
124	Sapna	Delacourt	Office of Cong. Jindal	Chief of Staff
125	Jerome	Clarke	Office of Cong. Johnson	Chief of Staff
126	David	Heil	Office of Cong. Johnson	Chief of Staff
127	Glen	Downs	Office of Cong. Jones	Chief of Staff
128	Ray	Yonkura	Office of Cong. Jordan	Chief of Staff

**Bicameral Chiefs of Staff Retreat**

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Name		Institution	Reason Invited:
129	Bryan Malenius	Office of Cong. Keller	Chief of Staff
130	Brenna Findley	Office of Cong. King	Chief of Staff
131	Kevin Fogarty	Office of Cong. King	Chief of Staff
132	Heather McNatt	Office of Cong. Kingston	Chief of Staff
133	Lester Munson	Office of Cong. Kirk	Chief of Staff
134	Steve Sutton	Office of Cong. Kline	Chief of Staff
135	Trent Wisecup	Office of Cong. Knollenberg	Chief of Staff
136	Brian Fitzpatrick	Office of Cong. Kuhl	Chief of Staff
137	Diane Liesman	Office of Cong. LaHood	Chief of Staff
138	Robert McCreary	Office of Cong. Lamborn	Chief of Staff
139	Mike Gruber	Office of Cong. Latham	Chief of Staff
140	Matthew Wallen	Office of Cong. LaTourette	Chief of Staff
141	Arlene Willis	Office of Cong. Lewis	Chief of Staff
142	Daniel London	Office of Cong. Lewis	Chief of Staff
143	Rob Woodall	Office of Cong. Linder	Chief of Staff
144	Mary Annie Harper	Office of Cong. LoBiondo	Chief of Staff
145	Stacey Glasscock	Office of Cong. Lucas	Chief of Staff
146	Victor Arnold-Bik	Office of Cong. Lungren	Chief of Staff
147	Jeff Cohen	Office of Cong. Mack	Chief of Staff
148	Adam Magary	Office of Cong. Manzullo	Chief of Staff
149	Brian Thomas	Office of Cong. Marchant	Chief of Staff
150	James Min	Office of Cong. McCarthy	Chief of Staff
151	Greg Hill	Office of Cong. McCaul	Chief of Staff
152	Martin Van Valkenburg	Office of Cong. McCotter	Chief of Staff
153	Clayton Hall	Office of Cong. McCrery	Chief of Staff
154	Jon Causey	Office of Cong. McHenry	Chief of Staff
155	Robert Taub	Office of Cong. McHugh	Chief of Staff
156	Bob Cochran	Office of Cong. McKeon	Chief of Staff
157	Connie Partoyan	Office of Cong. McMorris Rodgers	Chief of Staff
158	Rusty Roberts	Office of Cong. Mica	Chief of Staff
159	Jamie Roe	Office of Cong. Miller	Chief of Staff
160	Dan McFaul	Office of Cong. Miller	Chief of Staff

**Bicameral Chiefs of Staff Retreat**

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Name		Institution	Reason Invited:
161	John Rothrock	Office of Cong. Miller	Chief of Staff
162	Todd Novascone	Office of Cong. Moran	Chief of Staff
163	Susan Mosychuk	Office of Cong. Murphy	Chief of Staff
164	Guy Short	Office of Cong. Musgrave	Chief of Staff
165	Andy Polk	Office of Cong. Myrick	Chief of Staff
166	Gayland Barks	Office of Cong. Neugebauer	Chief of Staff
167	Johnny Amaral	Office of Cong. Nunes	Chief of Staff
168	Tom Lizardo	Office of Cong. Paul	Chief of Staff
169	Bob Carter	Office of Cong. Pearce	Chief of Staff
170	Bill Smith	Office of Cong. Pence	Chief of Staff
171	Jordan Clark	Office of Cong. Peterson	Chief of Staff
172	Debra Gebhardt	Office of Cong. Petri	Chief of Staff
173	Susan Butler	Office of Cong. Pickering	Chief of Staff
174	Gabe Neville	Office of Cong. Pitts	Chief of Staff
175	Scott Miller	Office of Cong. Platts	Chief of Staff
176	Heather Ramsey	Office of Cong. Poe	Chief of Staff
177	Michael Hesse	Office of Cong. Porter	Chief of Staff
178	Matt McGinley	Office of Cong. Price	Chief of Staff
179	Lori Salley	Office of Cong. Pryce	Chief of Staff
180	Mathew Joyner	Office of Cong. Putnam	Chief of Staff
181	Ted Maness	Office of Cong. Radanovich	Chief of Staff
182	Dean Peterson	Office of Cong. Ramstad	Chief of Staff
183	Lori Rowley	Office of Cong. Regula	Chief of Staff
184	Jay Martin	Office of Cong. Rehberg	Chief of Staff
185	Michael Shields	Office of Cong. Reichert	Chief of Staff
186	Brian Murray	Office of Cong. Renzi	Chief of Staff
187	Sally Vastola	Office of Cong. Reynolds	Chief of Staff
188	Marshall Macomber	Office of Cong. Rogers	Chief of Staff
189	Will Smith	Office of Cong. Rogers	Chief of Staff
190	Andy Keiser	Office of Cong. Rogers	Chief of Staff
191	Rick Dykema	Office of Cong. Rohrabacher	Chief of Staff
192	Art Estopinan	Office of Cong. Ros-Lehtinen	Chief of Staff



**Bicameral Chiefs of Staff Retreat**9/18/2007  
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Name		Institution	Reason Invited:
193	Steven Moore	Office of Cong. Roskam	Chief of Staff
194	Amy Porter	Office of Cong. Royce	Chief of Staff
195	Andrew Speth	Office of Cong. Ryan	Chief of Staff
196	Robert Schwarzwald	Office of Cong. Sali	Chief of Staff
197	Elise Aronson	Office of Cong. Saxton	Chief of Staff
198	Barry Bennett	Office of Cong. Schmidt	Chief of Staff
199	Tom Schreiber	Office of Cong. Sensenbrenner	Chief of Staff
200	Guy Harrison	Office of Cong. Sessions	Chief of Staff
201	Sean Noble	Office of Cong. Shadegg	Chief of Staff
202	Betsy Hawkings	Office of Cong. Shays	Chief of Staff
203	Craig Roberts	Office of Cong. Shimkus	Chief of Staff
204	Jeffrey Loveng	Office of Cong. Shuster	Chief of Staff
205	Lindsay Slater	Office of Cong. Simpson	Chief of Staff
206	Jeff Shapiro	Office of Cong. Smith	Chief of Staff
207	Mary Noonan	Office of Cong. Smith	Chief of Staff
208	Jennifer Brown	Office of Cong. Smith	Chief of Staff
209	Renee Howell	Office of Cong. Souder	Chief of Staff
210	Jack Seum	Office of Cong. Stearns	Chief of Staff
211	Elizabeth Bartheld	Office of Cong. Sullivan	Chief of Staff
212	MacArthur Zimmerman	Office of Cong. Tancredo	Chief of Staff
213	Eric Hultman	Office of Cong. Terry	Chief of Staff
214	Bill Harris	Office of Cong. Thornberry	Chief of Staff
215	Jeff Kahrs	Office of Cong. Tiahrt	Chief of Staff
216	Chris Zeigler	Office of Cong. Tiberi	Chief of Staff
217	Stacy Barton	Office of Cong. Turner	Chief of Staff
218	Joan Hillebrands	Office of Cong. Upton	Chief of Staff
219	Joe Wicks	Office of Cong. Walberg	Chief of Staff
220	Brian MacDonald	Office of Cong. Walden	Chief of Staff
221	Daniel Gage	Office of Cong. Walsh	Chief of Staff
222	Helen Hardin	Office of Cong. Wamp	Chief of Staff
223	Dana Gartzke	Office of Cong. Weldon	Chief of Staff
224	Jeanette Whitener	Office of Cong. Weller	Chief of Staff



**Bicameral Chiefs of Staff Retreat**

9/18/2007

3:28:28 PM

Name		Institution	Reason Invited:
225	Chip Lake	Office of Cong. Westmoreland	Chief of Staff
226	John Sparkman	Office of Cong. Whitfield	Chief of Staff
227	Michelle Barlow	Office of Cong. Wicker	Chief of Staff
228	Bryce Dustman	Office of Cong. Wilson	Chief of Staff
229	Dino Teppara	Office of Cong. Wilson	Chief of Staff
230	Daniel Scandling	Office of Cong. Wolf	Chief of Staff
231	Michael Anderson	Office of Cong. Young	Chief of Staff
232	Harry Glenn	Office of Cong. Young	Chief of Staff
233	Steve Stombres	Office of the Deputy Whip	Leadership Staff
234	George Canty	Office of the Leader	Leadership Staff
235	Dave Schnittger	Office of the Leader	Leadership Staff
236	Jo-Marie St. Martin	Office of the Leader	Leadership Staff
237	Mike Sommers	Office of the Leader	Leadership Staff
238	Trevor Kolego	Office of the Leader	Leadership Staff
239	Paula Nowakowski	Office of the Leader	Leadership Staff
240	Ed Cassidy	Office of the Leader	Leadership Staff
241	Greg Maurer	Office of the Leader	Leadership Staff
242	Brian Gaston	Office of the Whip	Leadership Staff
243	Neil Bradley	Office of the Whip	Leadership Staff
244	Kyle Nevins	Office of the Whip	Leadership Staff
245	Antonia Ferrier	Office of the Whip	Leadership Staff
246	Ashley Hoy	Office of the Whip	Leadership Staff
247	Melanie Looney	Office of the Whip	Leadership Staff



**Bicameral Chiefs of Staff Retreat**  
**Thursday, November 1<sup>st</sup> – Saturday, November 3<sup>rd</sup>**  
**The Hyatt Regency Chesapeake Bay, Cambridge, Maryland**

**TENTATIVE AGENDA**

**Thursday, November 1, 2007**

**12:00 - 1:45 Luncheon Meeting**

*Mark Strand, Congressional Institute President*  
*Republican Leader John Boehner*

- Discussion of Retreat format and goals
- Opening address

**2:00 - 3:00 New Ethics Rules: Managing your Member, Staff and External Relationships to Ensure Compliance**

*Jan Baran, Partner, Wiley Rein LLP*

*Ed Cassidy, Counsel, House Minority Leader*

Legal and Congressional experts will provide an overview of the new rules and answer participants' questions. Attendees will then split into smaller groups where they will be asked to resolve hypothetical situations where new ethics rules apply.

**3:00 - 4:30 Tele-Townhalls**

*Richard Thau, Presentation Testing*

Presentation of survey data on tele-townhall meetings. Followed by a "best practices" panel discussion by chiefs of staff whose offices have done numerous tele-townhall meetings. The presentation will be followed by a soup-to-nuts demonstration of a tele-townhall meeting.

**4:30 - 4:45 Break**

**4:45 - 5:45 General Petreus' Report: What Next for Iraq?**

*Guest speaker from the Administration*

Speaker followed by panel discussion by outside experts on possible scenarios in the year ahead.

**6:30 - 7:15 Reception**

**7:15 Dinner**

*Former Speaker Newt Gingrich*

Working for a new and better future through freedom and security

**Friday, November 2, 2007**

**8:00 - 9:00 Breakfast**

**9:00 - 10:00 Current Landscape**

*Dave Winston, The Winston Group*

*Richard Thau, Presentation Testing*

*Linda DiVall, American Viewpoint*

Panel discussion by panel of public opinion experts of what the current mood of the country is, what their expectations are, how do they see the current Congress.

**10:00 - 10:15 Break**

**10:15 - 11:15 Branding: Every Organization Has One, Deliberately or Not**

*Richard Costello, Former Director of Marketing for GE*

Every organization has a brand – or an essence. Its success depends on how well the public believes in that brand and its promise. Mr. Costello will review the branding process and what its implications are for Congressional action. Dave Winston will participate.

**11:15 - 12:00 Breakout Discussion Groups**

- Immigration
- Defense Policy
- Economic Security
- Tax Policy
- Health Care

**12:00 - 12:45 Lunch**

**12:45 - 1:30 General Session**

*Speaker to be announced.*

**1:45 - 2:45 Communicating with the White House**

*Candi Wolff, Assistant to the President for Legislative Affairs*

*Dan Meyer, Deputy Assistant to the President for Legislative Affairs*

How the White House is functioning with the Democrat Majority and what will the remaining year of the Bush presidency will look like.

**2:45 - 4:00 House and Senate Breakout Groups**

**4:00 - 4:15 Break**

**4:15 - 5:15 Congressional Websites**

*Richard Thau, Presentation Testing*

Most Congressional website and e-newsletter programs fall short in the eyes of constituents. The problem with HIR templates are that they don't provide what constituents really want from a website. Find out what survey show constituents want that they are not getting, how to design and implement an effective e-newsletter program, and whether or not paper mail such as postal patrons are still worth sending.

**5:15 - 5:30    Best Practice for E-Newsletter Program**  
Chiefs of Staff panel discussion.

**5:30 - 6:30    The Congressional Website of the Future**  
DJ Smith, Capital Idea Ventures & Former  
Live demonstration of the Congressional website of the future with an interactive component that will show chiefs how easy it is to add constituent favorites such as blogs, video – and how a search function that makes it easy to find positions and votes on issues would work. Presented by former IT Hill staffer D.J. Smith.

**6:30 - 7:00    Reception**

**7:00            Dinner**  
*Guest speaker to be announced.*

**Saturday, November 3, 2007**

**8:00-9:30    Breakfast**

**Walker, Linda**

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**From:** Cavicke, David  
**Sent:** Thursday, September 27, 2007 8:57 AM  
**To:** Walker, Linda; Drew, Whitney  
**Subject:** FW: Bicameral Chiefs of Staff Retreat: November 1-3, 2007  
**Importance:** High  
**Attachments:** COS Invite Letter HOUSE.pdf; COS RSVP Form.pdf; COS Fact Sheet.pdf; HOUSE Ethics Package.pdf

Lyn/Whitney I would like to attend this retreat. I would be grateful if you two would handle the paperwork. Please inquire if Christina may attend. (She is not technically my spouse). I will plan to stay Saturday at my own expense.

Thank you.

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**From:** Hawkings, Betsy  
**Sent:** Wednesday, September 26, 2007 12:27 PM  
**To:** Cavicke, David  
**Subject:** FW: Bicameral Chiefs of Staff Retreat: November 1-3, 2007

Did you get this this time?

I am sure if you RSVPd they would take you, their list just is not up to date

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**From:** Mark Strand [mailto:rsvp@conginst.org]  
**Sent:** Wednesday, September 26, 2007 9:35 AM  
**To:** Hawkings, Betsy  
**Subject:** Bicameral Chiefs of Staff Retreat: November 1-3, 2007



September 18, 2007

It is our pleasure to invite you to join us for the Bicameral Chiefs of Staff Retreat, November 1-3 at The Hyatt Regency Chesapeake Bay in Cambridge, Maryland. We hope you and your spouse will join us.

This invitation is being extended to House and Senate Minority personal Chiefs of Staff, Committee Staff Directors and Leadership Staff. The retreat is designed to strengthen professional relationships and encourage candid communications across different lines of responsibility. Enclosed is preliminary agenda for the retreat. A handful of speakers are still unconfirmed, but the Institute will continue to send updates on this agenda.

To comply with House rules, you need to have pre-authorization from the Committee on Standards of Official Conduct. Attached is a copy of the Institute's Private Sponsor Travel Certification Form. This form must be submitted with your completed Traveler Form by **October 1st** to the Committee on Standards of Official Conduct. Additionally, you must file a travel disclosure statement with the Clerk of the House upon your return.

The working sessions will begin at noon on Thursday, November 1st and conclude with dinner on Friday, November 2nd. Breakfast will be provided on Saturday, November 3rd. For your planning purposes, dress will be business casual.

The Institute will cover the cost of participation for each staff member and spouse. An extra night's stay at the conference rate is available at your personal expense. You are welcome to bring your children, though you will be responsible for the costs of their participation. Please see the attached Fact Sheet for more information.

The Hyatt is 85 miles from Capitol Hill. Driving time is around 1 hour and 45 minutes. While we are not providing group transportation, we do encourage car-

9/27/2007

**Bicameral Chiefs of Staff Retreat**  
**Thursday, November 1<sup>st</sup> – Saturday, November 3<sup>rd</sup>**  
**The Hyatt Regency Chesapeake Bay, Cambridge, Maryland**

**FACT SHEET**

**Eligible Participants:** The Bicameral Chiefs of Staff Retreat is open to House and Senate Minority personal Chiefs of Staff, Committee Staff Directors, and Leadership Staff.

**Ethics Requirements:** The Congressional Institute, Inc., is a not-for-profit corporation organized under Section 501(c)(4) of the Internal Revenue Code. It is not a lobbying organization or an agent of a foreign principal. The Congressional Institute will cover your expenses associated with attending this retreat. However, Senate and House ethics rules require that you obtain prior authorization to attend the retreat and file the relevant disclosure documents upon your return.

**Families:** Your spouse and children are welcome to attend; the Congressional Institute is permitted to cover the expense of a family member, typically a spouse. However, you will be responsible for the cost of your children, which is as follows:

- Camp Hyatt is offered by the hotel for children 4-12. Activities include arts & crafts, active games, board games, swimming, nature walks, movies, mini golf, water games and much more! The cost is:
  - 9:00 – 4:00 pm: \$75 per child
  - 9:00 – 12:00 pm or 1:00 pm – 4:00 pm: \$40 per child
  - 6:00 – 9:00 pm: \$50 per child

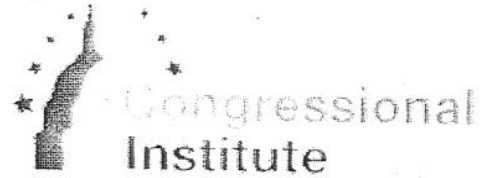
These charges will be billed directly to you as an incidental.

- For teens 13 years and older, that will be attending group meals, their estimated meal cost is \$235.50 for all group meals.
- An additional room is \$137.25 per night.

**Covered Expenses:** The Congressional Institute will cover your room, meals and all group activities. Other expenses, such as phone calls from your room, in-room movies, spa, recreation, shop purchases, etc., will be at your personal expense. The Hyatt will take a credit card imprint for any expenses of this nature upon check-in.

**Extended Stay:** If you would like to continue your stay through Sunday, the Hyatt is offering its conference room rate of \$137.25 per night.

**Transportation:** Transportation will be on your own. The Hyatt is 85 miles from Capitol Hill and the drive time is around 1 hour and 45 minutes.



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September 18, 2007

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The Hyatt is 85 miles from Capitol Hill. Driving time is around 1 hour and 45 minutes. While we are not providing group transportation, we do encourage car-pooling.

Please return the enclosed registration form via fax to 703-837-8817 if you are planning to attend the Bicameral Chiefs of Staff Retreat. We understand your registration is tentative pending ethics approval. If you have any questions, please contact Phil Russell (russell@conginst.org) at 202-547-4600.

Sincerely,



Mark N. Strand  
President